

Detail expectations for the daily workflow

Upon Check in

- For each patient checked in scan ID/DL or ensure ID/DL is current and if scanned previously (green)the front desk should open scanned card and ensure it matches the patient. (No previous empty card has been scanned)
- For each patient, scan the INS Card or ensure the card on file is current and if scanned previously (green) the front desk is still responsible for confirming it matches what is on file. (No previous empty card has been scanned)
- When providing the patient with forms, reiterate to them to make any demographic changes.
- Help patients who may require it. Ensure confidentiality and privacy by locating a suitable private area for sensitive discussions or procedures.
- Once the patient has completed the forms, review to make sure all questions have been answered.
- If you observe that the patient has left some questions unanswered, return the tablet to them for completion. Due to the open nature of the lobby, it is advisable not to ask questions aloud to maintain patient privacy.
- Once all questions have been completed. Review forms and confirm.
- Look for special notes such as “CD with PT” ask the patient to return to the front desk and explain to them what is being required before they leave.
- Once you have completed your check list tag the patient READY TO BE SEEN.
- All Sedation and transportation appts should be cancelled.
- Collect any OOP due at time of service.

Check out

- All patients should be checked out in a timely manner.

If Unforeseen circumstances prevent you from checking out patients as they walk out, ensure that this is done as quickly as possible.

- If you notice that you have failed to provide the patient with a CD, create a CD request to be mailed to the patient’s address.
- You will notice that the system will not allow you to check out if Financials are not in place, this potentially means that you may have not collected as required, if this is the case create the financials to complete the check out.

CD requests pick up

- Often the patient will walk in to pick up a copy of their CD. Please make sure you take the following steps.
- Always verify the identity of the patient before releasing any medical records. Requesting a valid form of identification, such as a driver's license, is standard practice to confirm the patient's identity. Specific instructions are provided in the HMI Report Policy regarding procedures to follow if someone other than the patient is picking up the medical records. Refer to the policy for further guidance on handling such requests. [3.1 HMI REPORT POLICY](#)
- Once the CD is delivered to the patient, mark the CD DELIVERY DONE in the CD tracking.